

Current trends of media use in Estonia

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The Estonian landscape of traditional media over the last two to three years can be characterised as relatively stable. The average TV viewing time in Estonia increased significantly up to the year 2003 and then stabilised. The general amount of radio listening was quite stable in 2000-2002, decreased from 2003 to 2006, and has since stabilised again. The share of regular newspaper readers among Estonian adult population was quite stable in 2000-2002, slightly decreased in 2003-2004, and then stabilised again. Since the year 2000, the interest in magazine reading, initially boosted by a new variety of titles, formats, and topics, has started to decrease.

Ethnicity and education remain important factors affecting general media use, but the main factor has become age. Large disparities between age groups appear not only in Internet usage but also in newspaper and magazine reading, radio listening, and TV viewing. Among the youngest age groups we can refer to an Internet-centred media environment and about media convergence.

Key words: media use, traditional media, Internet, Estonia, comparative research

After the major societal changes in 1988-2004 (see Lauristin, Vihalemm, 1998; Vihalemm, 2004; 2006), the Estonian landscape of traditional media over the last two to three years can be characterised as relatively stable. However, in spite of the relative stability of the use of traditional media by the adult population, there are growing differences between age groups.

General trends of media use

Table 1 characterises the level of media use in recent years in comparison with 2000. Table 2 presents general indicators of media use in the years 2000-2007 (in November

of the respective year). On the basis of the data presented in Table 1, we can conclude that the average TV viewing time in Estonia increased significantly up to the year 2003 and then stabilised. We can also conclude that the general amount of radio listening has been quite stable, remaining on the same level of 3 hours 29 minutes in 2000-2002, then decreasing from the year 2003-2006, and then stabilising again in 2006.

The average TV viewing time has continually increased, with an average of 4 hours 30 minutes for the year 2002. In an international comparison, Estonia reached the level of the top five television viewing

Table 1. Recent general trends of media use in Estonia, 2000-2007 (2000 = 100%)

	2000	2001	2002	2003	2004	2005	2006	2007
Average number of newspapers regularly read	100	99	94	93	87	86	86	90
Average number of magazines regularly read	100	102	92	90	75	78	91	83
Average TV viewing time per day	100	106	115	96*	97*	91*	96*	97*
Average radio listening time per day	100	100	100	140*	135*	126*	117*	118*
Share of Internet users	100	115	154	165	168	187	211	232

Source: TNS Emor

* Change in data collection methodology since January 2003 – TV meters introduced instead of viewers' diaries, and more precise determination of radio listening (instead of general listening, the respondent should separately indicate in the listener's diary radio listening in the car, in the workplace and at home).

countries in Europe and in the world (Hasebrink, Herzog, 2004, p. 147).

It is important to mention that changes in TV viewing and radio listening figures in 2003 and 2004 compared to previous years reflect changes in methodology, not in actual media use.¹ In early 2003 the

¹ As the result of more precise determination of viewing time, the average TV viewing time became shorter. Comparing the data from November 2002 and November 2003, the decrease was 44 minutes (see Table 2). An additional effect was obviously produced by the extended age limits of the sample, as the amount of viewing time among the age groups 4-14 and over 75 is a bit smaller, compared to the average of the previous sample (covering ages from 15 to 74). The fact that the average TV viewing time in November 2004 has not changed compared to the data of November 2003 (4 hours 6 minutes and 4 hours 4 minutes respectively) proves our assumption about the effects of methodology as the reason why the data from 2002 and 2003 are so different.

In 2003 some important changes were also introduced in data collection methodology concerning radio audiences. Since January 2003, the listener's diary has become more precise; respondents are instructed that they should not only mark what radio channel they are listening to, but also where they are doing it – at home, at the workplace, in a car. Table 2 shows that as a result of this change, much more frequent determination of occasional radio listening had taken place, and the average listening time has increased for almost one and

leading Estonian opinion and market research company TNS Emor, which has been carrying out audience monitoring since 1993, introduced TV meters (electronic devices connected to TV sets) to replace TV viewing diaries. Changes were also made in sample composition: instead of population aged 12-74, all people older than 4 years were included in the survey. Because of these changes in data collection methodology, it is important to remember that the data in the Table 1, reflecting TV viewing and radio listening in 2003 and 2004, are not exactly comparable with the data from 2000-2002.

The Internet arrived in Estonia relatively early, in June 1992. Since 1995 Internet access and usage have increased rapidly (see Herron, 1999), currently placing Estonia among the top 10 countries in the European Union with respect to Internet penetration

a half hour per day. Besides the mentioned change in the diary format, there is no other reason to expect such a big increase in radio listening time, which has been very stable for years.

Table 2. Aggregated indicators of media use in Estonia, 2000-2007 (in November of the respective year)

	2000	2001	2002	2003	2004	2005	2006	2007
Newspaper reading								
General reading (share of regular or irregular readers of any newspaper, %) ¹	95	94	95	92	91	93	92	92
Regular readers (share of regular readers of any newspaper, %) ²	79	76	78	75	71	76	73	74
Average number of newspapers generally read	4.05	3.69	3.86	3.71	3.35	3.31	3.54	3.65
Average number of newspapers regularly read	2.11	2.08	1.98	1.97	1.83	1.81	1.82	1.90
Reading of magazines								
General reading (share of regular or irregular readers of any magazine, %) ³	86	86	85	85	81	79	79	77
Regular readers (share of regular readers of any magazine, %) ⁴	72	73	71	70	64	65	65	62
Average number of magazines generally read	5.57	5.47	4.96	4.65	3.99	4.05	4.71	4.43
Average number of magazines regularly read	2.55	2.59	2.35	2.30	1.92	1.98	2.33	2.12
Radio: average listening time per day (h: min)*	3: 29	3: 29	3: 29	4: 52	4: 41	4: 24	4: 04	4: 06
Television: viewing time per day (h: min)*	4: 14	4: 28	4: 50	4: 04	4: 06	3: 52	4: 05	4: 07
Internet: have used during last six months (%)	28	33	44	47	47	53	59	66

Source: TNS Emor

* Change in data collection methodology since January 2003 – TV meters introduced instead of viewers' diaries, more precise determination of radio listening.

1 - Have read at least one of the last six issues of any newspaper

2 - Have read at least four of the last six issues of any newspaper

3 - Have read at least one of the last six issues of any magazine or other periodical

4 - Have read at least four of the last six issues of any magazine or other periodical

and online availability of public services (see Eurostat data of 2007 at <http://epp.eurostat.cec.eu.int>).

When analysing press reading in Estonia (Table 2), a distinction is usually made between two levels of reading – regular and irregular. As empirical indicators for measuring reading regularity, we have used answers to the question: “Have you read any of the last six issues of this publication?” Reading from at least four of the last six issues had been interpreted as regular

reading, one to three issues as irregular reading.² In our analysis we have also used aggregated indices of regularity in contacts with newspapers and magazines. These indices had been computed summarizing answers about regularity of reading for all newspapers and respectively also for all magazines.

² These indicators have been used by the leading Estonian marketing research and consulting company TNS Emor, and are presented also in Table 3 (general reading = regular + irregular reading).

In Table 2 press reading is characterised by two kinds of aggregated indicators, which are complementary to each other – the share of people who generally and regularly read newspapers, magazines, and other periodicals (according to the above-mentioned criteria, used by the TNS Emor) and the average number of generally and regularly read newspapers and magazines by one person. These indicators highlight slightly different trends in press reading. On the basis of Table 2 we can conclude that the share of regular newspaper readers among the Estonian adult population was quite stable in 2000-2002, slightly decreasing in 2003-2004, and then stabilising. Only about 5-10 per cent do not read any newspapers at all, but a much larger number of people, 25-30 per cent, do not read newspapers regularly. As we can see from below, there is a difference in regular newspaper reading between Estonians and non-Estonians; between the young generation, on the one hand, and middle-aged and elderly people on the other. At the same time the average number of newspapers read regularly or irregularly by one person, has clearly decreased from 2000 to 2005, and afterwards slightly increased.

Compared to newspapers, recent trends in reading magazines and other periodicals are relatively similar, with the exception that the number of periodicals read by the average Estonian decreased in 2004 more than the number of newspapers. Since 2000, the interest in magazine reading, initially boosted by new varieties of titles, formats, and topics, started to decrease.

Social factors of media use

The long tradition of media and communication research in Estonia (see Vihalemm,

2001) has given us an opportunity to trace throughout the last decades the changes in social factors, which are affecting media use.

According to surveys carried out by the Department of Journalism at Tartu University and by the sociological research group of Estonian Radio and Estonian TV in the 1970s and 1980s, during the Soviet era, education and **ethnicity** were the main differentiating factors of media use (see Lauristin et al., 1987; Vihalemm, 2004). These surveys revealed that in the life of local Russians, press reading and radio listening played a significantly smaller role, compared with the majority of the population. The Russian-speaking population did not use Estonian language media. At the same time, in Estonia there were fewer available Russian-language media channels. Estonians have a long tradition of newspaper reading. Estonian newspapers and magazines have been an important part of national integration since the middle of the 19th century, and had also preserved this function under Soviet rule (see Hoyer, Lauk, Vihalemm, 1993).

Education had a notable influence on press reading (more highly educated people read more), and a smaller effect on radio listening and TV viewing (people with higher education were less active listeners and viewers).

Are these tendencies continuing to exist in the new social conditions? The indicators, which characterise current trends in media consumption by the main demographic groups, are presented in Table 3. The data are from November 2007 and are represented using the same aggregated indicators as in Table 2.

Table 3. Aggregated indicators of media use in Estonia in main demographic groups, November 2007

	Whole population	Ethnicity		Gender		Age Groups						Education		
		Estonians	Non Estonians	Men	Women	15-19	20-29	30-39	40-49	50-59	60-74	Primary	Secondary	Tertiary
NEWSPAPER READING														
Proportion of General readers (%)	92.2	94.7	87.1	91.2	93.1	92.4	90.4	95.1	91.3	92.7	91.7	88.8	92.5	95.0
Proportion of Regular readers (%)	74.0	76.7	68.5	69.3	78.0	59.8	63.9	76.3	76.5	78.8	82.8	66.4	73.7	82.6
Average number of newspapers generally read	3.65	3.90	3.14	3.58	3.71	3.42	3.52	3.87	3.99	3.66	3.36	2.84	3.7	4.32
Average number of newspapers regularly read	1.90	2.06	1.56	1.71	2.06	1.21	1.46	2.02	2.11	2.07	2.23	1.36	1.89	2.47
READING OF MAGAZINES AND OTHER PERIODICALS														
Proportion of General readers (%)	76.7	87.8	54.0	72.1	80.7	85.8	78.0	81.0	77.1	72.4	69.9	73.3	75.7	82.9
Proportion of Regular readers (%)	61.5	75.0	34.1	53.9	68.1	60.2	60.4	64.4	66.2	56.1	60.9	57.8	59.7	70.5
Average number of periodicals generally read	4.43	5.85	1.56	3.54	5.22	5.09	4.85	5.17	4.79	3.77	3.22	3.73	4.32	5.47
Average number of periodicals regularly read	2.12	2.83	0.67	1.53	2.64	1.66	1.95	2.36	2.40	2.12	2.04	1.69	2.08	2.67
USE OF ELECTRONIC MEDIA														
Radio: daily listening time (minutes)	246	246	245	237	255	125	219	215	256	305	337	180	279	227
Television: daily viewing time (minutes)	247	230	284	227	265	170	158	240	237	313	353	212	274	243
Internet usage during last six months (%)	65.5	68.8	58.9	66.9	64.3	98.3	94.0	87.8	69.8	43.1	14.5	51.0	64.1	84.3

** The sample represents population aged 15-74, in the case of press reading and Internet usage; for TV viewing, the population is older than 4 years; for radio listening, the population aged 12-74.*

On the basis of Table 3, we can conclude that ethnicity remains one of the main factors affecting media use. It influences consumption of traditional media more than the Internet. Education continues to strongly affect the regularity and scope of reading the press; the role of education has even increased over the last decade.

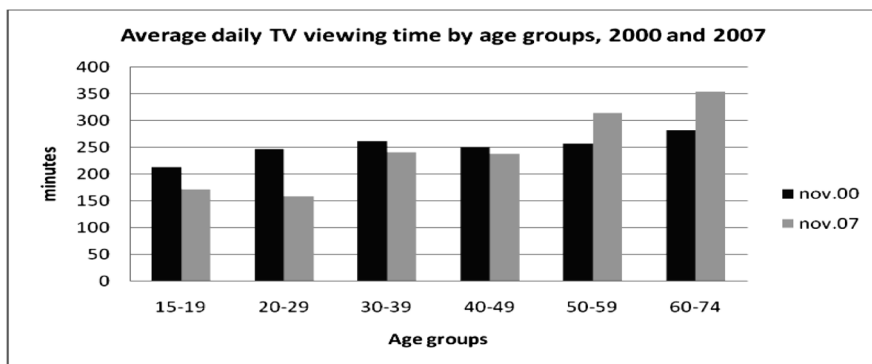
However, **age** has become the main factor of general media use. Large disparities between the age groups appear not only in Internet usage but also in newspaper and magazine reading, radio listening, and TV viewing. The youngest group (aged 15-19 years) is characterized by more frequent and diverse use of the Internet than the second age group (aged 20-29 years); for the youngsters, the Internet has become the main source for entertainment, for reading newspapers and magazines, listening to music and following TV and radio programs, studying and communicating with friends (Vengerfeldt, Runnel, 2004). This trend indicates the beginning of a fundamental shift in media use in Estonia: among the youngest age group we can refer to an Internet-centred media environment and about media convergence.

Generational divide in media use

Huge differences can be observed in the volume and character of Internet use by the youngest and oldest age groups. The share of Internet users in Estonia was in November 2007 98% among the youth (15-19 years), and 15% among the people over the age of 60. When for middle aged and older people the Internet is a complementary medium to the traditional channels of information, then for the young generation it is the main, if not the only medium, used for all purposes of communication.

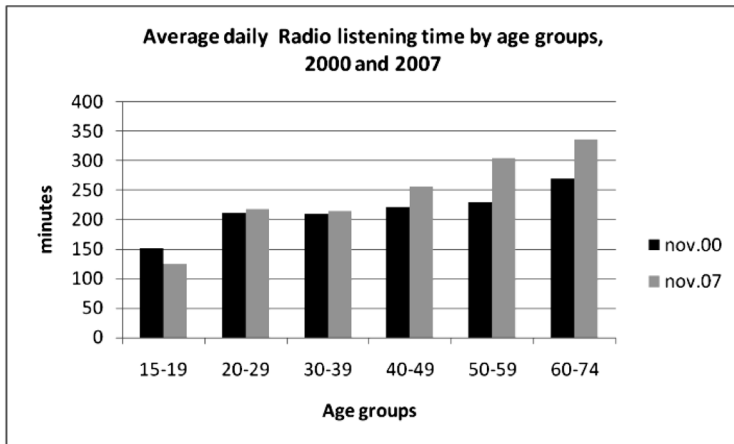
Comparing the data about the traditional media consumption from 2000 and 2007, we can observe that the difference in the average TV viewing time per day in the youngest and oldest age groups has increased from one hour to three hours, the difference in average radio listening time per day from two hours to three and a half (see Figures 1 and 2).

In the youngest age group the average TV viewing time has decreased by almost one hour (in the next group, 20-29 by even more, one and a half hours), and among the elder generation, in the two oldest age groups, the increase is approximately one hour. These



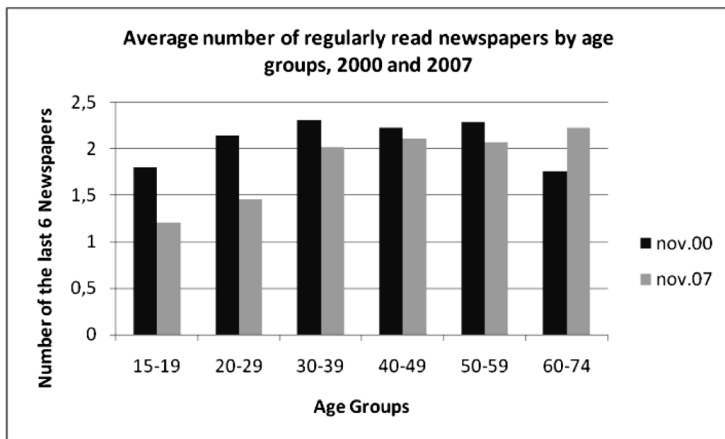
Source: TNS Emor

Figure 1. Average daily TV viewing time by age groups, 2000 and 2007



Source: TNS Emor

Figure 2. Average daily Radio listening time by age groups, 2000 and 2007



Source: TNS Emor

Figure 3. Average number of regularly read newspapers by age groups, 2000 and 2007

changes have happened step-by-step, year-by-year during the period 2000-2007.

The decrease in the average radio listening time in the youngest age group is smaller compared to the decrease of TV viewing time (and in the age group 20-29, radio listening time did not change at all).

The bigger decrease of TV viewing time compared to radio listening time can be explained by a bigger convergence of TV and Internet use by the young generation, while

radio listening is less influenced by the growth of multifunctional use of the Internet.

The average number of regularly read newspapers was in 2000 relatively similar across the age groups except for the youngest and the oldest groups, which read significantly fewer newspapers. In 2007 the differences were significantly bigger and proportionally related to age, the younger age groups have started to read much less and the oldest significantly more (Figure 3).

The decrease of regular newspaper reading in the two youngest age groups can also be explained by the more multifunctional use of the Internet. According to the data of the research company Saarpoll, the proportion of people reading dailies only on the Internet has in recent years considerably increased, consisting in autumn 2007 of about 25–30% of the whole audience (Trükimeedia uuring sügis, 2007). We can assume that the majority of these readers belong to young generation. This does not only mean the changes in the character of the media channel, but also changes in the regularity of contacts. Reading online editions of dailies is probably more irregular compared to paper editions.

Besides the different volume of traditional media usage there are big age differences in interest and preferences regarding media content. Young people are much more oriented towards entertainment programs, and less interested in news and discussions. This is reflected in the ageing of the audience who use the public service broadcasting channels. People over the age of 50 dominate the audience of public service radio and TV programs. According to the data of TNS Emor (www.emor.ee), in the summer of 2007, among the audience of public service radio programme Vikerraadio (which is the most popular in Estonia) the proportion of people in the age group 50-74 was 73% whereas the proportion of people in the age group 12-29 was only 3%. In November 2007, among the audience of public service Eesti TV the proportion of people over 55 was 50% and of people in the age group 4-24 12%.

As a result, the age structure of the news audience in all channels is shifting towards the older groups. According to our survey

data from 2005, the proportion of respondents who were exposed to news content delivered by different media channels, including the Internet, at least once per day, was 43% among the youngest group, 67% among the middle aged audience and 77% among the elderly people. This trend reflects a lower level of interest in traditional forms of politics and a lower level of participation in public affairs among the young generation. The participation of the young generation in e-forums, the rise of political blogging, social networks such as YouTube and other emerging forms of e-democracy are the new and challenging areas of our research.

Concluding remarks

1. Among the social factors of media use, age is of the greatest general importance. For younger people, the Internet is of great importance. The younger generation is also more entertainment-oriented, read fewer newspapers and more general interest magazines compared to middle-aged and older people, and shows a preference for commercial radio and TV channels to the public broadcast sector.
2. The uses of traditional and new media are in general complementary to each other. Only among the younger generation, especially in the youngest group (aged 15-19) can we observe that with the Internet becoming a multifunctional channel, the use of traditional media (particularly TV viewing and regular press reading) is on the decrease.
3. There is an interest and need to compare the trends described above with data in other countries, particularly trends of media use in different age groups in Baltic and Nordic countries.

4. The main problem with international comparisons is the lack of comparable data. In situations where the data about media use in different countries are based on different indicators and different methodology, cross-national comparisons could be made using differences drawn from the average of the total population, and measured by the particular set of indicators in the each country.
5. There is a need for an international agree-

ment concerning key indicators in the field of media use and for an agreement on the harmonisation of methodology and criteria of data gathering. The first step towards such an agreement could be regular exchange of research data among Baltic and Nordic media scholars, and the organisation of seminars and workshops on trends of media use in different social groups, particularly in age groups.

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ŠIUOLAIKINĖS ŽINIASKLAIDOS VARTOJIMO TENDENCIJOS ESTIJOJE

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S a n t r a u k a

Tradicinės žiniasklaidos vartojimas Estijoje pastaraisiais metais laikomas gana stabilu. Vidutinis TV žiūrėjimo laikas ženkliai augo iki 2003 m., o po to stabilizavosi. Bendras radijo klausymosi lygis buvo gana stabilus 2000-2002 m., sumažėjo 2003-2006m., o vėliau taip pat stabilizavosi. Reguliarių laikraščių skaitytojų dalis tarp suaugusių šalies gyventojų išliko nepakitęs 2000-2002 m., šiek tiek sumažėjo 2003-2004 m., o vėliau stabilizavosi. Išaugęs žurna-

lų skaitymas, paskatintas naujų leidinių, formatų ir temų atsiradimo, nuo 2000 m. ėmė mažėti.

Etiniškumas ir išsimokslinimas išlieka svarbiais faktoriais, sąlygojančiais bendrą žiniasklaidos naudojimą šalyje, tačiau svarbiausiu reikėtų laikyti amžių. Reikšmingi skirtumai tarp amžiaus grupių yra būdingi ne tik interneto vartojimui, bet ir laikraščių ir žurnalų skaitymui, radijo klausymui bei TV žiūrėjimui. Galima teigti, jog jauniausioji amžiaus grupė yra labiausiai veikiamą internetinės žiniasklaidos aplinkos ir jos konvergencijos.